




P. O. Box 83720, Boise, ID 83720-0078  
208-334-3365 1-800-451-8228 FAX: 208-334-3805

## 1099R Forms

**Boise, Idaho – January 22, 2016**

Tax documents for PERSI Base Plan distributions (1099R) for 2015 began mailing January 22, 2016 and will all be in the mail next week. This form is also available for retirees to download. Click the myPERSI [  ] link on the home page of the PERSI web site ([www.persi.idaho.gov](http://www.persi.idaho.gov)). When the log-in page appears, access your account using your email address and password, then follow the instructions. If you haven't received your PERSI Base Plan 1099R in the mail by February 7, 2016, please call the PERSI Answer Center toll-free at 1-800-451-8228 or 208-334-3365 from the Boise area. If you call, please have your personal information available including your Social Security Number.

Because of the Choice 401(k) Plan record keeping transition from Xerox HR Solutions to Empower Retirement mid-year, two separate 1099R mailings are occurring this month. Below you can see distribution dates, mailing dates, and issuers for the Choice Plan.

Distribution Dates	1099R Forms Issued By	1099R Forms Mailing Dates
1/1/2015 - 4/30/2015	BNY Mellon (Xerox)	By 1/27/2016
5/1/2015 - 12/31/2015	Empower Retirement	Most mailed week of 1/18; a few left to mail over the next day or two.

Some PERSI retirees may end up getting three 1099R forms, depending on when they took withdrawals from the Choice Plan in 2015.

# # #